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Introduction

SmartOffice Mobile PC is a robust and complete mobile solution for disconnected users. Developed as a Microsoft Windows® based desktop application, it adopts a consistent user interface from SmartOffice®. SmartOffice Mobile PC requires additional licensing apart from the standard SmartOffice license.

Using a run-time Microsoft Access® database to store field-level data that is synchronized with the enterprise database, SmartOffice Mobile PC can be thought of as a miniature SmartOffice on the users' local computer. The synchronization between the local database and the enterprise database can capture the following information:

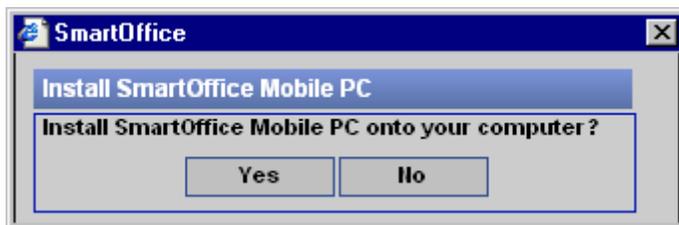
- Contact
 - Individual records
 - Business records
- SmartPad™
- Calendar
 - Including activity tracking and the SmartOffice One Card System™
- Policies
- Investments
- Form Letter Selection

While in the disconnect stage, users can add and modify records in SmartOffice Mobile PC and have those changes synchronize back into the enterprise database.

Installation from SmartOffice

To install SmartOffice Mobile PC:

1. Select **Installations** from the expanded **User Setup** menu to display the Installations list.
2. Select **SmartOffice Mobile** to begin the installation.
Note: If a warning displays that asks for permission to download an application from E-Z Data, Inc. click the **Yes** button to enable the download to occur.
3. From the Install SmartOffice Mobile PC dialog box, click the **Yes** button.



Note: Open the installation directly from SmartOffice instead of saving it and running it locally.

4. Proceed through the SmartOffice Mobile PC InstallShield Wizard.

SmartOffice Mobile PC Setup Wizard

To specify the setup criteria for SmartOffice synchronization with SmartOffice Mobile PC:

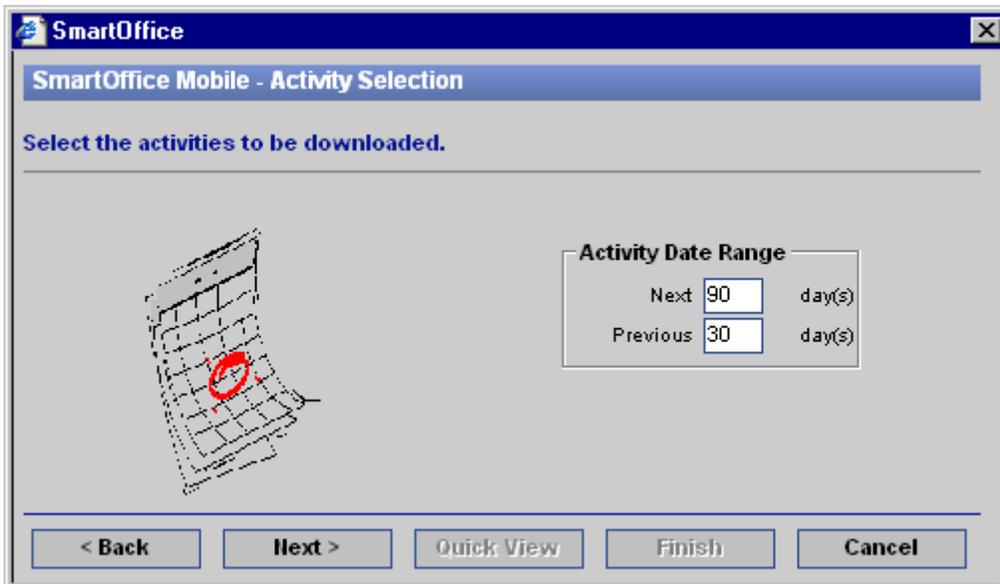
1. Select **SmartOffice Mobile Setup** from the expanded **Synchronization** menu, to open the SmartOffice Mobile – Synchronization Setup Wizard.



2. Click the **Next** button to open the Contact Selection dialog box. This displays the selection options for Contacts, including both Individuals and Businesses. All contacts in the database can be downloaded, or specify a select group of contacts based on a set.



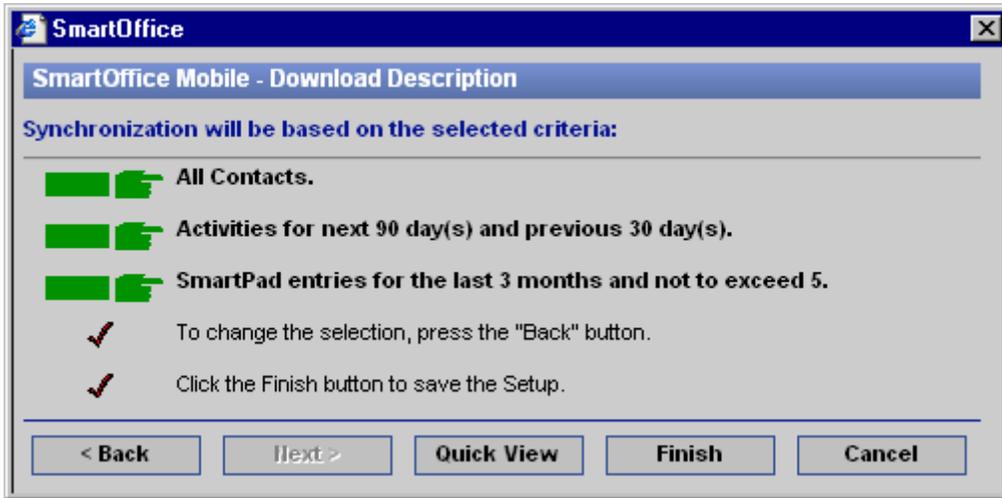
3. Select the appropriate option and then click the **Next** button to open the Activity Selection dialog box. This displays the selection options for Activities. Both timed and un-timed activities are downloaded for the specified date range. Define the date range of these activities by specifying the number of days in both the Next and Previous Days fields.



4. After specifying the Activity Date Range, click the **Next** button to open the SmartPad Selection dialog box. This displays the selection options for SmartPad entries. Select the total number of months for which to synchronize SmartPad entries and then specify the maximum number of SmartPad entries to synchronize.



5. Enter the SmartPad Downloading Options and then click the **Next** button to open the Download Description dialog box. This displays a summary of the information to be downloaded to the SmartOffice Mobile PC application whenever synchronization is performed.



6. After reviewing the information, click the **Finish** button. After the user completes the setup for SmartOffice synchronization with SmartOffice Mobile PC, it is not necessary to go through the setup wizard again. However, to change the scope of the information to be synchronized between SmartOffice and SmartOffice Mobile PC, it will then be necessary to modify the selections in the wizard.

Synchronization from SmartOffice

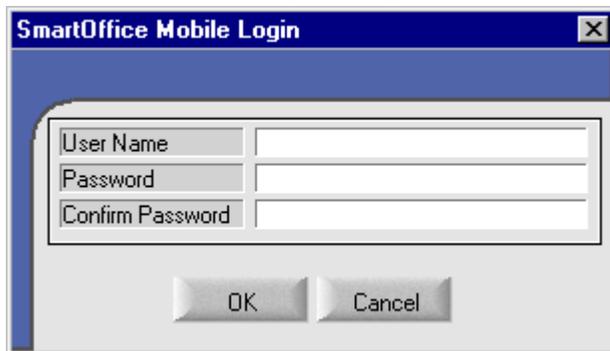
Once the criteria for SmartOffice synchronization with SmartOffice Mobile PC is set up, synchronize.

To begin the synchronization process:

- Select **Sync SmartOffice Mobile** from the expanded **Synchronization** menu to begin the synchronization process.

SmartOffice Mobile PC

Click the **SmartOffice Mobile** icon that was previously saved to the desktop to open the SmartOffice Mobile Login dialog box.



Contacts

Upon opening SmartOffice Mobile PC, the Contact Summary is displayed.

There are two ways to view the Contact (Individual or Business) records:

- From the Individual Contact Summary, click each letter of the alphabet located at the bottom of the spreadsheet to display only those contacts whose Last Name begins with the selected letter in the spreadsheet.



- From the Individual Contact Summary, click the **Asterisk** button located at the end of the alphabet to display all of the contacts in a single spreadsheet.

Note: In order to view Business Contact records, click the **Business** button on the top menu bar.

Create an Individual Contact Record

To create a new Contact Record:

1. From the Record menu:
 - a. Click the **Record** menu from the Individual Contact Summary.
 - b. Select the **Add** option to open the Please Select a Contact Sub-system Type dialog box.Or,
2. From the Individual Contact Summary:
 - Click the **Add** button to open the Please Select a Contact Sub-system Type dialog box;
 - or,
 - Press **Ctrl + A** from the Individual Contact Summary to open the Please Select a Contact Sub-system Type dialog box.

- When the Please Select a Contact Sub-system Type dialog box opens, select the appropriate option from the drop-down list and then click the **OK** button to display the Details tab.

The screenshot shows the 'Details' tab of a contact record. The top navigation bar includes tabs for Summary, Details, Household, Key Relations, Benefit, Activity Log, SmartPad, Holdings, and Opportunities. The main content area is divided into several sections:

- Personal Information:** Fields for Last Name, First Name, Greeting, Type, Source, Referred By, Marital, SS#, Review Date, Suffix, Middle Name, Title, Sub Type, Sub Source, Birth Date/Age, Gender, Child#, and Tobacco.
- Phone Numbers:** A table with columns for Type and Phone Number.
- Addresses:** A table with columns for Type, Street, and City.
- E-mail/Web Addresses:** A table with columns for Type and Web Address.
- Business Information:** Fields for Employer, Occupation, and Job Title.

- Enter the Personal, Business, Phone Number, Address, and E-mail/Web Address information and then click the **Save** button.

Phone Numbers

- From the Contact Details tab, click the **Add** button in the Phone Numbers section to open the Phone Information dialog box.

The 'Phone Information' dialog box contains the following fields and controls:

- Phone Type:** A drop-down menu currently set to 'Business'.
- Country Code:** An empty text field.
- Area Code:** A text field containing '626'.
- Dial Number:** A text field containing '664-5634'.
- Extension:** A text field containing '523'.
- Best time to call:** An empty text field.
- Preferred Phone:** A checked checkbox.
- Remarks:** A text area for additional notes.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom.

- Select the Phone Type from the corresponding drop-down list.
- Enter the remaining phone information and then click the **OK** button.

Addresses

1. From the Contact Details tab, click the **Add** button in the Addresses section to open the Address Information dialog box.

Address Type	Business
Street Line1	1876 Henson Road
Line2	
City	Pasadena
State	CA
ZIP Code	91106
Country	
Preferred Address	<input checked="" type="checkbox"/>

Remarks :

2. Select the Address Type from the corresponding drop-down list.
3. Enter the remaining address information and then click the **OK** button.

E-mail/Web Addresses

1. From the Contact Details tab, click the **Add** button in the E-mail/Web Addresses section to open the E-mail/Web Address Information dialog box.

Address Type	E-Mail
E-Mail Address	
Preferred	<input checked="" type="checkbox"/>

Remarks :

2. Specify the appropriate Address Type option from the corresponding drop-down list.
3. Enter the remaining address information and then click the **OK** button.

Modify a Contact Record

1. From the Individual Contact Summary, select the contact record to be modified and then click the **Details** tab.
2. Modify the applicable information and then click the **Save** button.

Modify a Phone Number

1. From the Contact Details tab, select the phone number to be modified and then click the **Modify** button to open the Phone Information dialog box.
2. Modify the phone information as necessary and then click the **OK** button.

Modify an Address

1. From the Contact Details tab, select the address to be modified and then click the **Modify** button to open the Address Information dialog box.
2. Modify the address information as necessary and then click the **OK** button.

Modify E-mail/Web Addresses

1. From the Contact Details tab, select either the E-mail or Web address to be modified and then click the **Modify** button to open the E-mail/Web Address Information dialog box.
2. Modify the address information as necessary and then click the **OK** button.

Delete a Contact Record

After synchronization takes place, no Contact record can be deleted. The exception is to delete a newly created Contact record prior to synchronization. If this is the case, there are four ways to delete a Contact (Individual and Business) record:

1. From the Record menu:
 - a. From the Individual Contact Summary, select the Contact record to be deleted (has not yet been synchronized).
 - b. Select **Delete** from the expanded **Record** menu to display the Record Deletion Confirmation dialog box.
 - c. Select the **Yes** button to delete the selected Contact record.
2. From the Individual Contact Summary:
 - a. Select the Contact record to be deleted (has not yet been synchronized).
 - b. Click the **Delete** button to display the Record Deletion Confirmation dialog box.
 - c. Select the **Yes** button to delete the selected Contact record.
3. From the Contact Details tab:
 - a. From the Individual Contact Summary, select the Contact record to be deleted (has not yet been synchronized) and then click the **Details** tab.
 - b. Click the **Delete** button to display the Record Deletion Confirmation dialog box.
 - c. Select the **Yes** button to delete the selected Contact record.
4. Using the keyboard:
 - a. From the Individual Contact Summary, select the Contact record to be deleted (has not yet been synchronized) and then press **Delete** on the keyboard to display the Record Deletion Confirmation dialog box.
 - b. Select the **Yes** button to delete the selected Contact record.

Delete an E-mail/Web Address

1. From the Contact Details tab, select either the E-mail or Web address to be deleted.
2. Click the **Delete** button to display the Record Deletion Confirmation dialog box.
3. Select the **Yes** button to delete the selected address.

Create a Business Contact Record

The process of creating a Business Contact record is identical to the steps required to add an Individual Contact record apart from first clicking the **Business** button to display the Business Summary. Refer to the *Create an Individual Contact Record* section.

Phone Numbers

Adding a phone number for a Business record is identical to the steps required to add a phone number for an Individual Contact record. Refer to the *Contact Phone Numbers* section.

Addresses

Adding an address for a Business record is identical to the steps required to add an address for an Individual Contact record. Refer to the *Contact Addresses* section.

E-mail/Web Addresses

Adding an E-mail/Web address for a Business record is identical to the steps required to add an E-mail/Web address for an Individual Contact record. Refer to the *Contact E-mail/Web Addresses* section.

Modify a Business Record

Modifying a Business record is identical to the steps required to modify an Individual Contact record. Refer to the *Modify a Contact Record* section.

Modify a Phone Number

Modifying a Business phone number is identical to the steps required to modify an Individual Contact phone number. Refer to the *Contact Modify a Phone Number* section.

Modify an Address

Modifying a Business address is identical to the steps required to modify an Individual Contact address. Refer to the *Contact Modify an Address* section.

Household

The Household tab displays the members of the Contact's Household and their roles.

Create a Household

1. From the Individual Contact Summary, select a Contact and then click the **Household** tab.
2. Click the Household Name field **Add** button to open the Find Household Information dialog box.
3. Click the **OK** button to open the Household Search Result dialog box.
4. Click the **Quick Add** button to open the Quick Add Household dialog box.
5. Enter the Household Name and Household Head and then click the **OK** button.
6. The newly created Household will display in the Household Name drop-down list.
7. Select the appropriate Household Name from the corresponding drop-down list.

Add Member(s) to a Household

Once a Contact's Household has been created, members can be added to that household.

1. From the Household Members section, click the **Add** button to open the Find Contact Information dialog box.
2. Enter the name of the Contact to be added to the household and then click the **OK** button.
3. The selected Contact's name will display on the Contact Search Result list.
4. Select the appropriate record and then click the **OK** button to open the Member Role dialog box.
5. Select the appropriate Member Role from the corresponding drop-down list and then click the **OK** button.

Modify Member(s) of a Household

After synchronization takes place, no Household Members can be modified. The only exception is to modify a newly created Household Member prior to synchronization.

1. From the Household Members section, select the member to be modified and then click the **Modify** button to open the Household Member Details dialog box.
2. Modify the Member Role as necessary and then click the **OK** button.

Delete Member(s) from a Household

After synchronization takes place, no Household Member(s) can be deleted. The only exception is to delete a newly created Household Member prior to synchronization.

1. From the Household Members section, select the appropriate household member and then click the **Delete** button to open the Record Deletion Confirmation dialog box.
2. Select the **Yes** button to delete the selected Household Member(s).

Key Relations

The Key Relations tab displays the Contact's Key Relations, Business Relations, and Referred Contacts. All of these three types of Relations cannot be modified or deleted.

Add Key Relations

1. From the Individual Contact Summary, select a Contact and then click the **Key Relations** tab.
2. From the Key Relations section, click the **Add** button to open the Find Contact Information dialog box.
3. Click the **OK** button to open the Contact Search Results dialog box.
4. Select the applicable Contact and then click the **OK** button to open the Key Relationship Details dialog box.
5. Specify the applicable Relationship information and then click the **OK** button.

Select relation of Marilyn A Albano with Joseph Ackerman.		
Relationship Types	Family	
Marilyn A Albano is	Aunt	of Joseph Ackerman
Joseph Ackerman is	Nephew	of Marilyn A Albano

OK Cancel

Modify Key Relations

After synchronization takes place, no Key Relations can be modified. The only exception is to modify a newly created Key Relation prior to synchronization.

1. From the Key Relations section, select the Key Relation to be modified and then click the **Modify** button to open the Key Relationship Details dialog box.
2. Modify the necessary information and then click the **OK** button.

Add Business Relations

1. From the Individual Contact Summary, select a Contact and then click the **Key Relations** tab.
2. From the Business Relations section, click the **Add** button to open the Find Business Information dialog box.
3. Click the **OK** button to open the Contact Search Results dialog box.
4. Select a Business and then click the **OK** button to open the Select a Role dialog box.
5. Select a Role from the corresponding drop-down list and then click the **OK** button.

Modify Business Relations

After synchronization takes place, no Business Relations can be modified. The only exception is to modify a newly created Business Relation prior to synchronization.

1. From the Business Relations section, select the Business Relation to be modified and then click the **Modify** button to open the Business Key Relationship Details dialog box.
2. Modify the necessary information and then click the **OK** button.

Add Referred Contacts

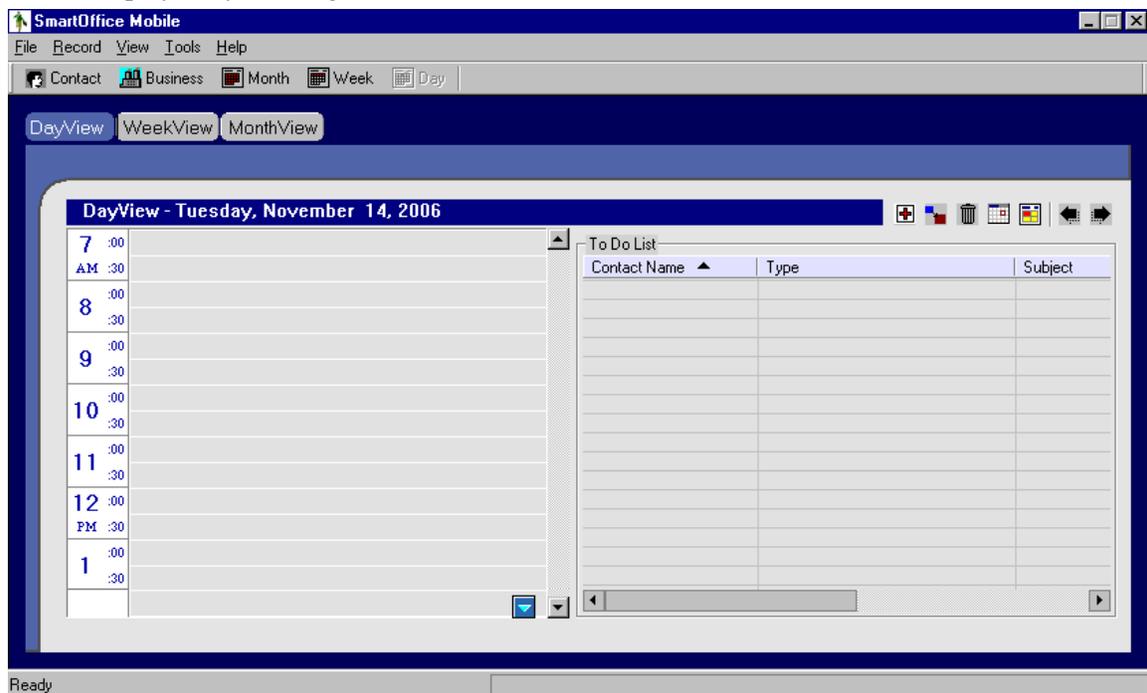
1. From the Individual Contact Summary, select a Contact and then click the **Key Relations** tab.
2. From the Referred Contacts section, click the **Add** button to open the Find Contact/Business Information dialog box.
3. Click the **OK** button to open the Contact Search Result dialog box.
4. Select a Contact and then click the **OK** button.

Calendar

The Calendar views are the DayView, WeekView, and MonthView.

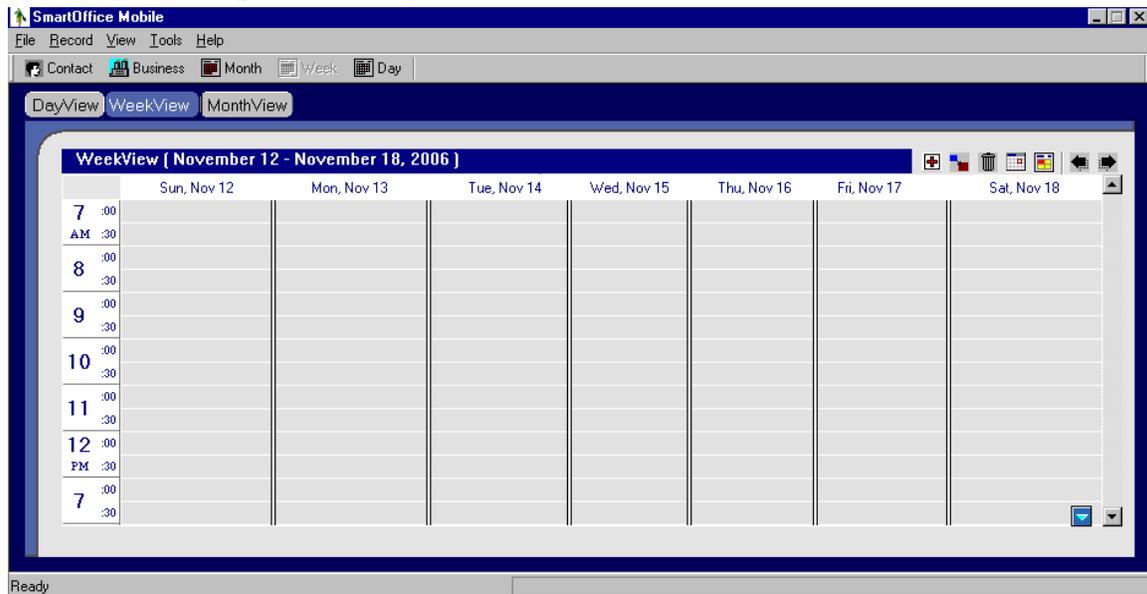
DayView

The DayView is used to display the activities for a specific day. Previous and future day activities can be displayed by clicking the Previous or Next buttons.



WeekView

The WeekView is used to display the activities for a specific week. Previous or future week activities can be displayed by using the Previous or Next buttons.



MonthView

The MonthView is used to display the activities for a specific month. Previous or future month activities can be displayed by using the Previous or Next buttons.



Activity Log

The Contact's Activity Log tab displays a list of both timed and un-timed activities scheduled for the selected Contact.

Add an Activity

1. From the Individual Contact Summary, select a Contact and then click the **Activity Log** tab.
2. Click the **Add** button to open the Activity Details dialog box.

Activity Details

Contact Name: Brad Abernathy

Activity Detail Information

Start Date / Time: 11/14/2006 01:38 PM Priority: Low

End Date / Time: 11/14/2006 02:08 PM Status: Active

All Day Event: Untimed Activity: Show Time As: Busy

Place: Tracked:

Type/Sub - Type: Appointment Approach/New Private:

Keywords: Due Date: 11/14/2006

Opportunity: Subject:

Reason

OK Cancel

3. Enter the activity information and then click the **OK** button.
4. A Confirmation Letter dialog box opens.
5. Select the **Yes** button to send a Confirmation Letter.
6. Select the **No** button to skip sending a Confirmation Letter.

Modify an Activity

1. From the Individual Contact Summary, select a Contact and then click the **Activity Log** tab.
2. Select an activity to be modified and then click the **Modify** button to open the Activity Details dialog box.
3. Modify the information as necessary and then click the **OK** button.

Delete an Activity

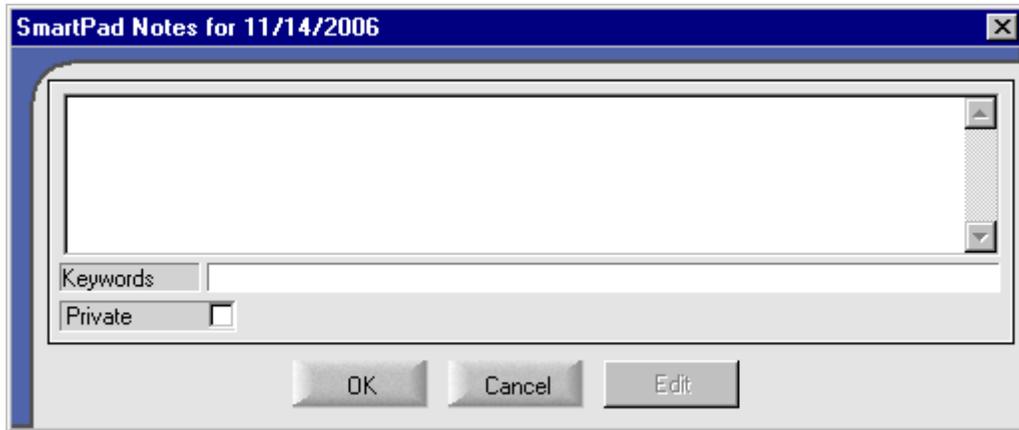
After synchronization takes place, no Activity can be deleted. The only exception is to delete a newly created Activity prior to synchronization.

1. From the Contact's Activity Log tab, select an activity to be deleted and then click the **Delete** button to open the Record Deletion Confirmation dialog box.
2. Select the **Yes** button to delete the selected Activity.

SmartPad

Add a SmartPad Note

1. From the Individual Contact Summary, select a Contact and then click the **SmartPad** tab to display the SmartPad Summary.
2. Click the **Add** button to open the SmartPad Notes dialog box.



3. Enter the SmartPad text and then click the **OK** button.

Modify a SmartPad Note

After synchronization takes place, no SmartPad entries can be modified. The only exception is to modify a newly created SmartPad entry prior to synchronization.

1. From the SmartPad Summary, select a SmartPad entry to be modified and then click the **Modify** button to open the SmartPad Notes dialog box.
2. Modify the necessary information and then click the **OK** button.

Delete a SmartPad Note

After synchronization takes place, no SmartPad entries can be deleted. The only exception is to delete a newly created SmartPad entry prior to synchronization.

1. From the SmartPad Summary, select a SmartPad entry to be deleted and then click the **Delete** button to open the Record Deletion Confirmation dialog box.
2. Select the **Yes** button to delete the selected SmartPad entry.

Holdings

On the Holdings tab, both the Contact's Policy and Investment information are displayed. In SmartOffice Mobile PC, no Policy or Investment records can be added, modified, or deleted.